



Avatar Support Guide

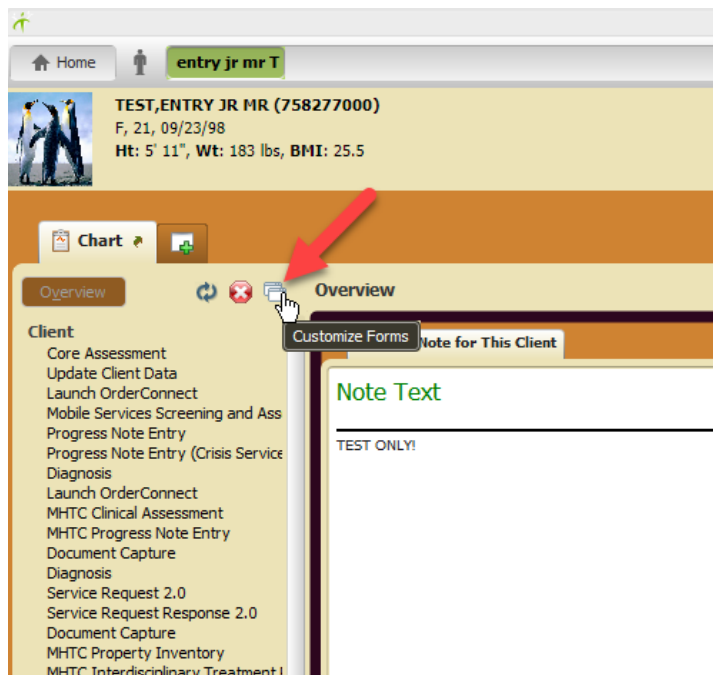
Sacramento County Avatar Training and Support

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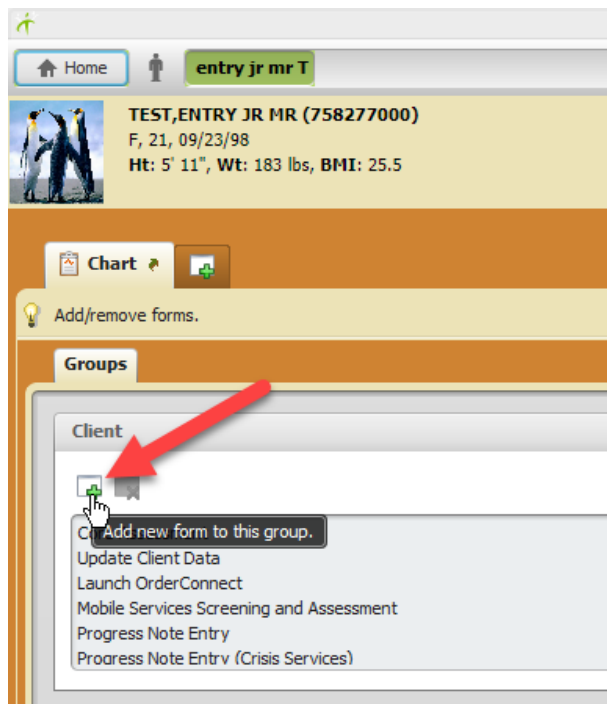
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How to Add Document Capture or other forms to Chart view

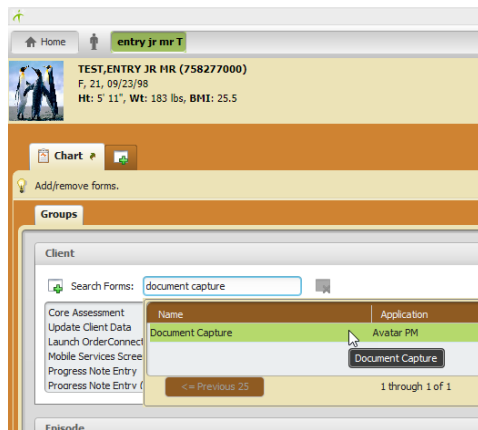
1. Click on the “Customize Forms” icon



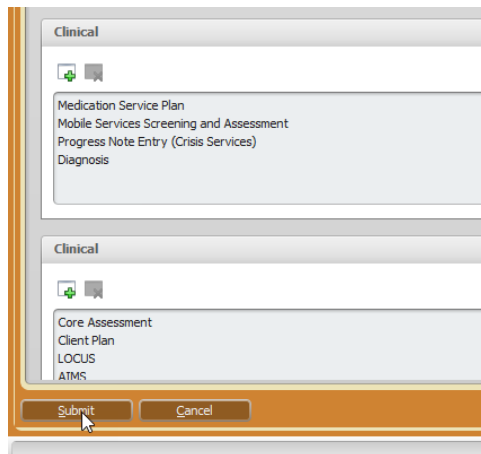
2. Click on the “Add new form to this group” icon



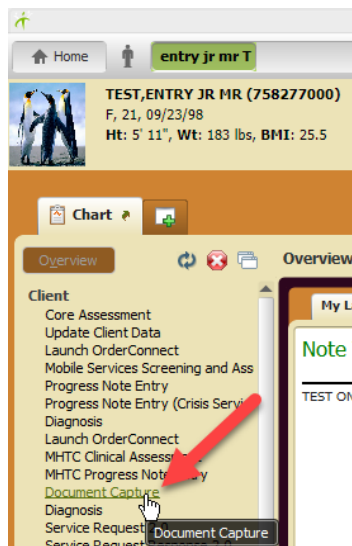
3. Type in “Document Capture” or the name of the form to search. Then double click on the name of the form in the search results.



4. Click on the “Submit” button at the bottom



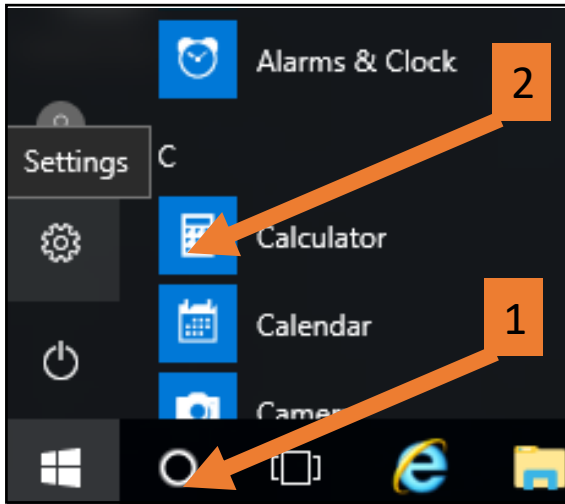
5. Verify that the option has been added and click on “Document Capture” to launch.



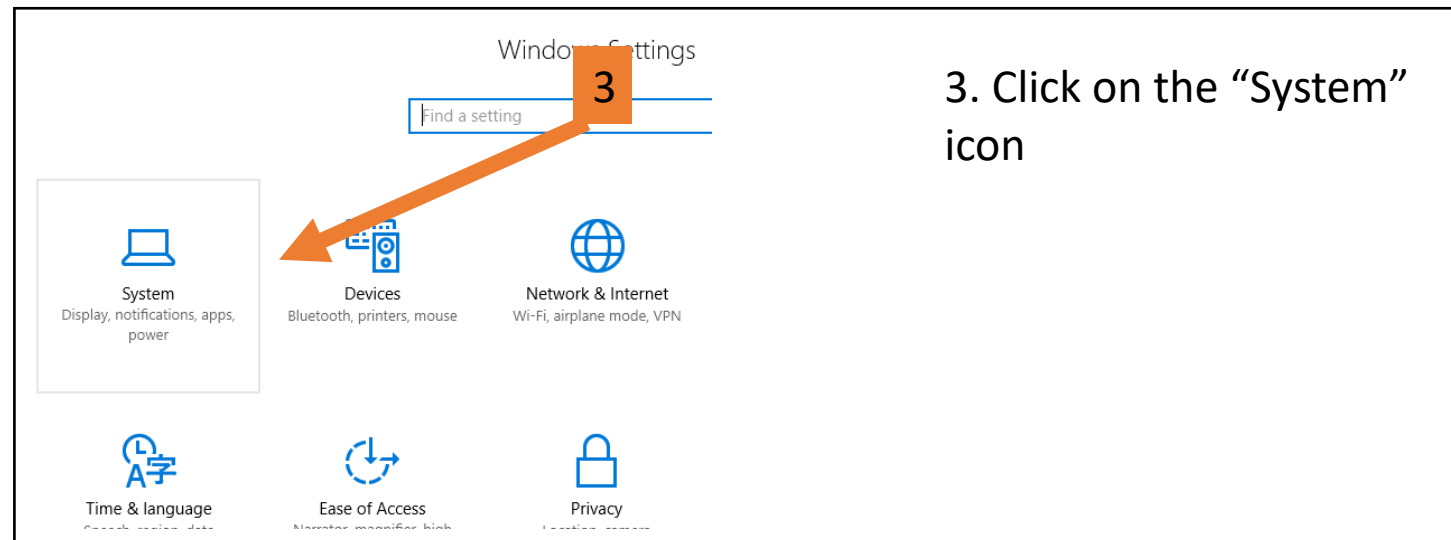
****Note**** You can also search for “Client Document Capture” from Search Forms if you want to open it separately.

Changing the Default Browser

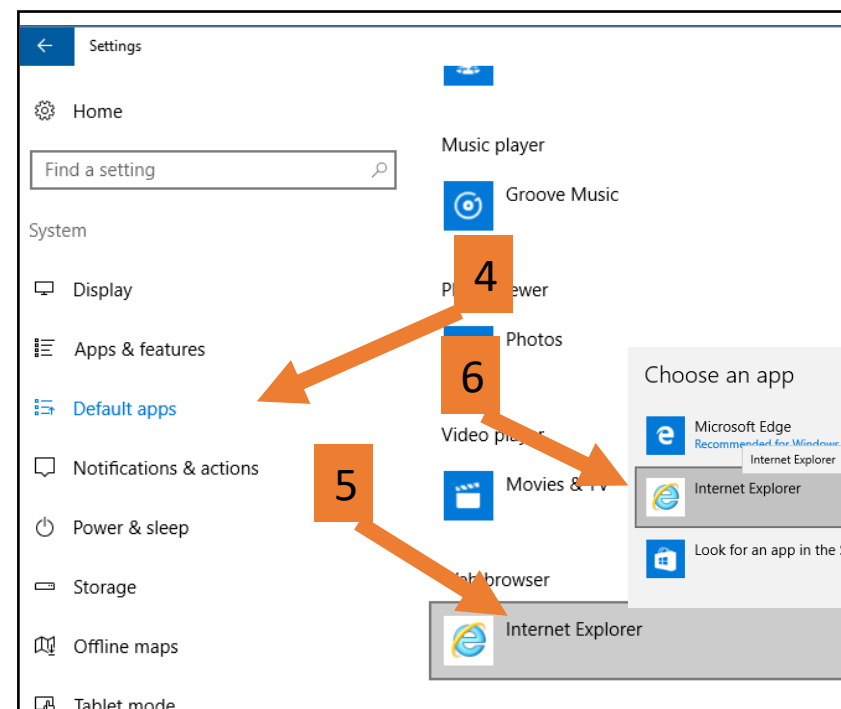
The preferred browser for myAvatar is Internet Explorer



1. Click on the Windows icon in the lower right hand side of your screen.
2. Click on the “Settings” Icon, to Open the “Windows Settings” window



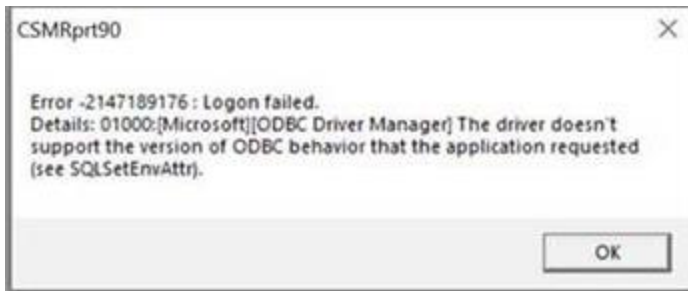
3. Click on the “System” icon



4. Click on “Default Apps”
 5. Click on the “Web Browser” section
 6. Select the “Internet Explorer” browser
 7. Close the Window
- Now you should be able to launch Avatar.

Clearing Report errors

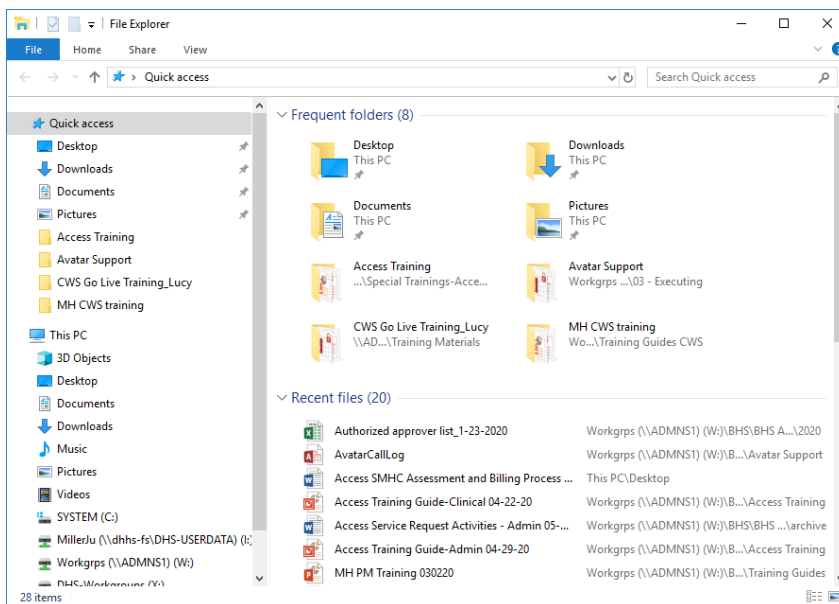
If you receive the following error it may be due to the archived copy of the report being corrupt and needs to be deleted.



1. Click on the File Explorer Icon on the bottom of the computer screen

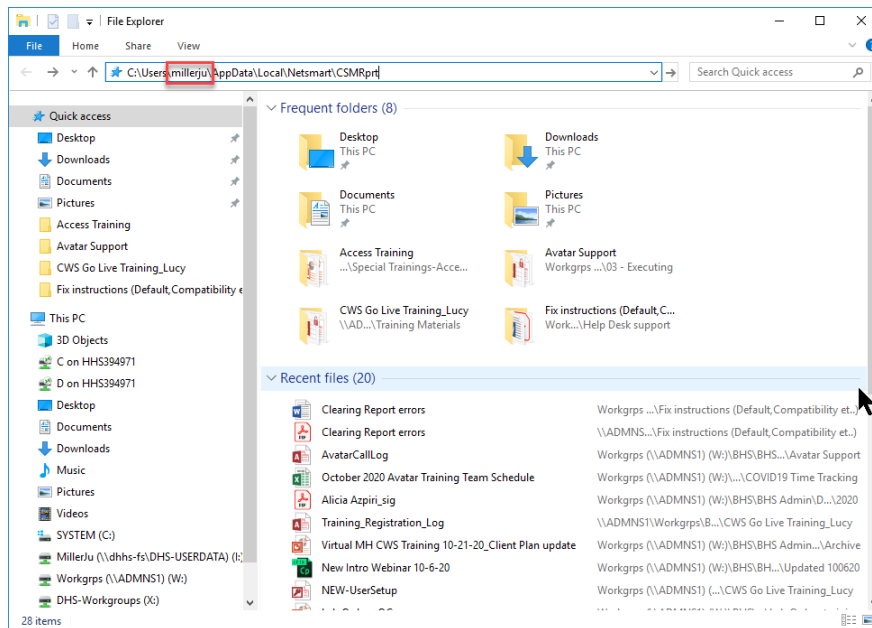


2. A file Explorer window will open

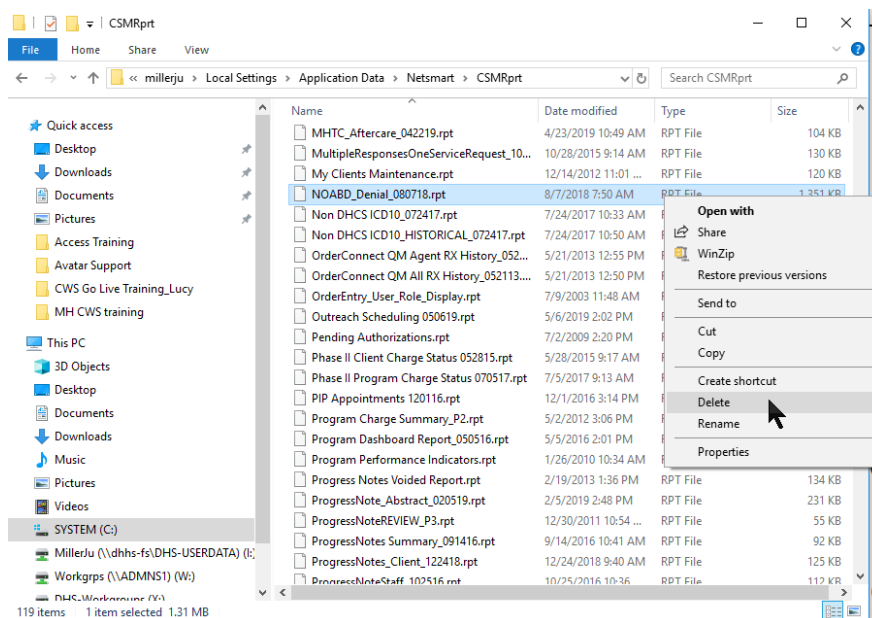


3. Copy and Paste the following link where "Quick Access" is and replace the <your computer login here> with your computer username. (see example below)

C:\Users\<your_computer_name_here>\AppData\Local\Netsmart\CSMRprt



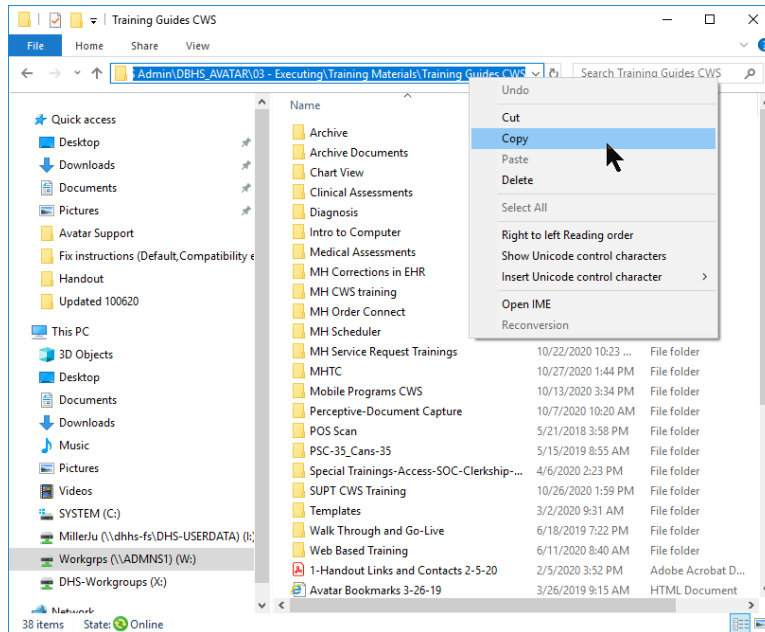
4. Press Enter and it should take you to the correct Folder. Find the Report you are having an issue with and right click and choose "Delete". And the report should remove.



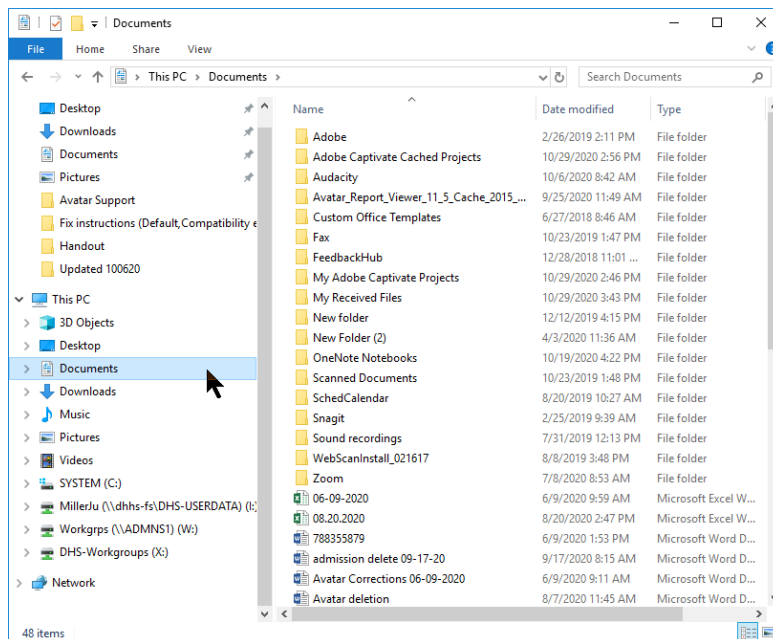
5. Restart the Computer
6. Open Avatar
7. Try to re-run the report

Creating a shortcut in the Documents folder for Document Capture

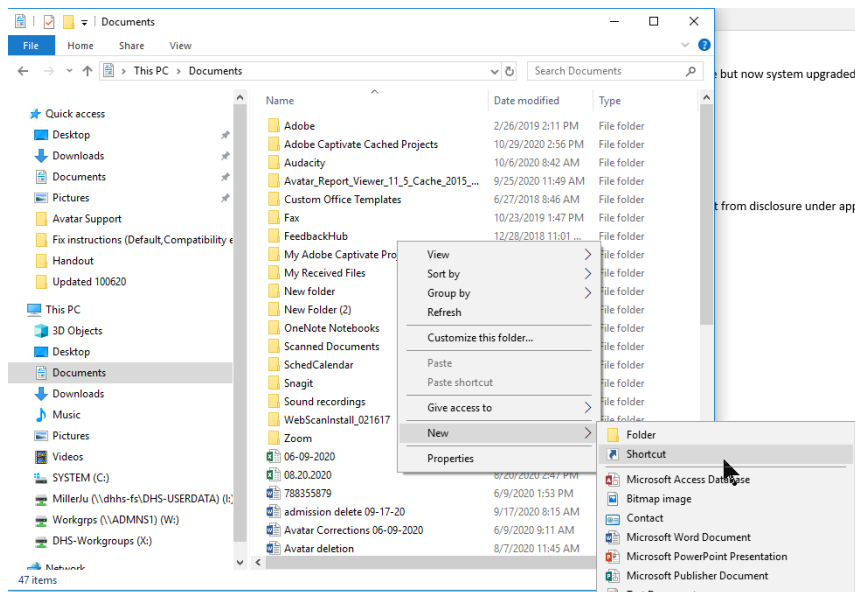
1. Go to the folder you normally store your documents in your shared drive.
2. Copy the shortcut there
 - Click on the path in the window
 - Right click on the highlighted address
 - Select Copy



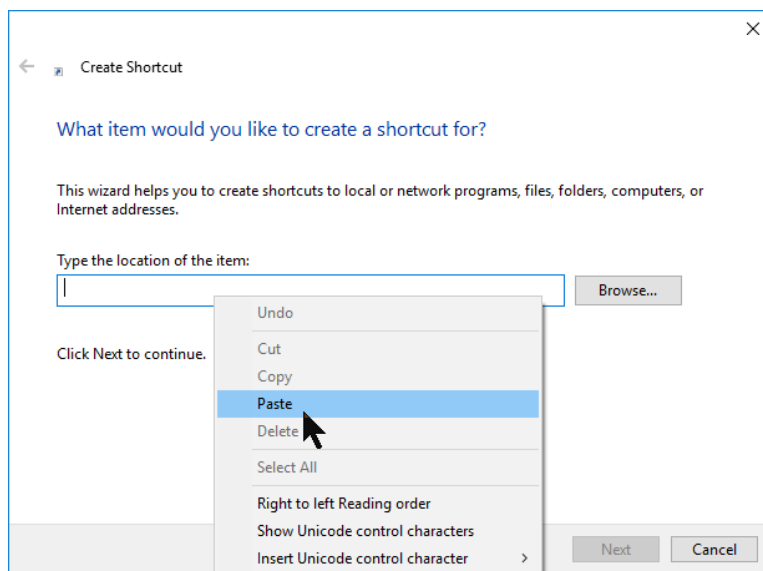
3. Click on the Documents link on the left



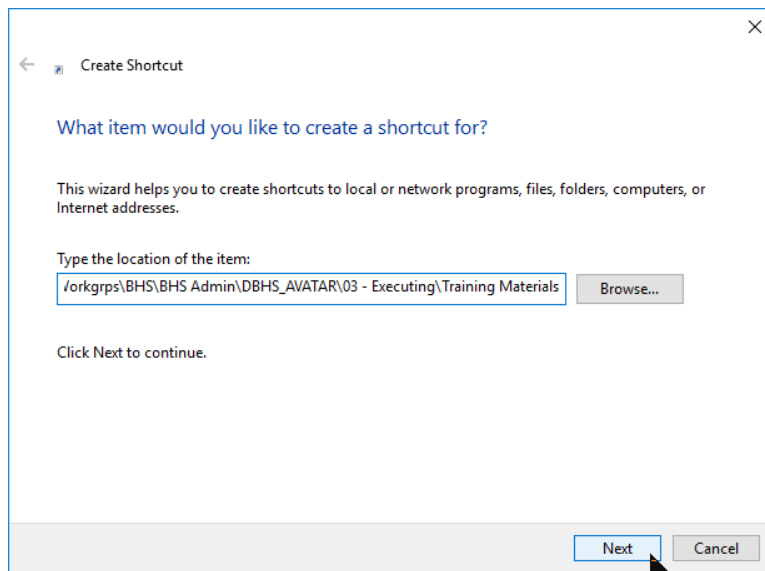
4. Right click in an empty space and navigate to "New" then Shortcut



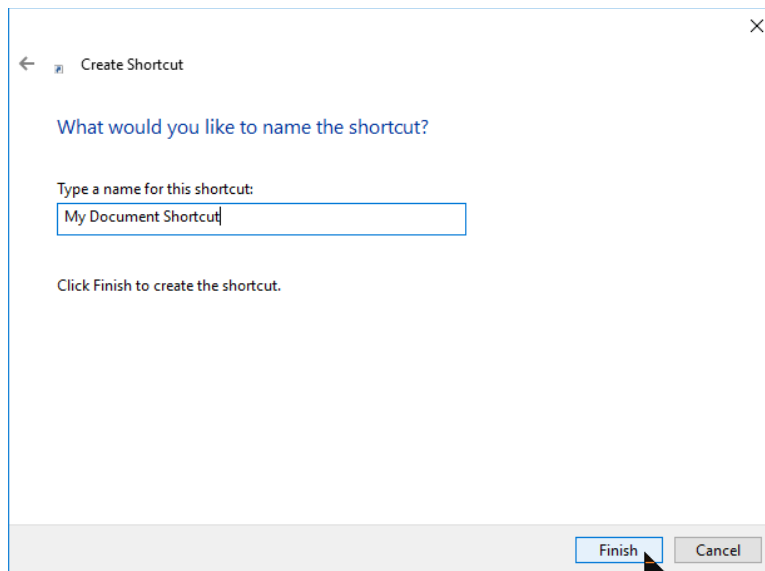
5. Right click on the field and select “Paste”



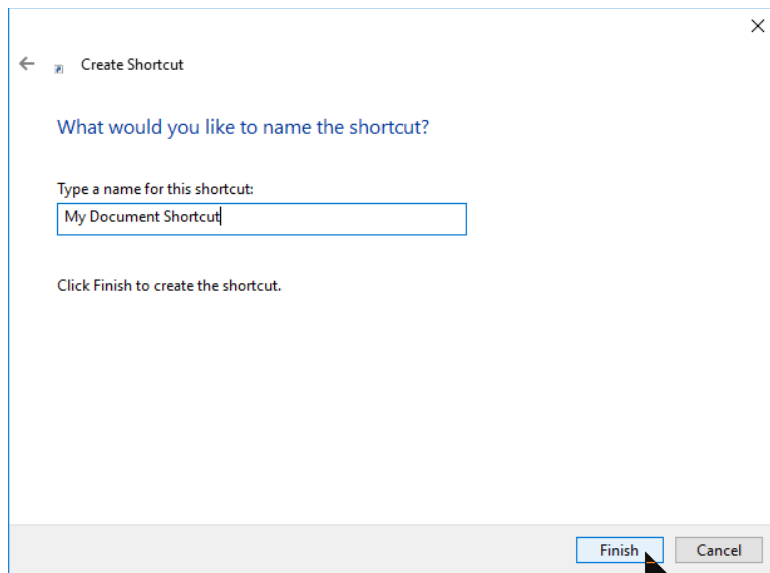
6. Click “Next”



7. Name your Shortcut to the folder



8. Then you should be able to access that folder each time from the Documents Folder



Deleting a Draft Assessment from the Pre-Display

1. Click on the **Green +** sign from the Chart view or go to search forms on the Home Screen
2. Search for the **Draft Assessment** you want to delete and double click to open the form from the search results

The screenshot shows a user interface for a healthcare system. A modal window titled 'My Forms' is open, displaying a search for 'csi assess'. The search results show one item: 'CSI Assessment' with the menu path 'Avatar PM / Client Management / California Required EDI'. The background shows a patient profile for 'TEST, ENTRY (758277000)' with a date of birth of 05/11/96 and a BMI of 26.5. The left sidebar contains navigation options like 'Client', 'Episode', and 'Documents'.

3. Select **Episode** from Pre-Display

The screenshot shows the 'CSI Assessment' form for the same patient. It displays a table of episodes. The episode 'El Hogar Adult-OP-Bercut' is highlighted in green. The table has columns for Episode, Program, Start, and End. The bottom of the screen shows 'OK' and 'Cancel' buttons.

Episode	Program	Start	End
27	Dignity-BHCSC-Coyle	01/01/2019	07/09/2019
24	Visions-Child-OP-Galt	05/31/2019	
23	SOH-The Source-Children-Sutterville	05/30/2019	05/30/2019
21	APCC-TWIC-14th Ave	02/07/2019	02/07/2019
20	El Hogar Adult-OP-Bercut	02/07/2019	
18	Stanford-TBS-volunteer	01/09/2019	
17	TUES-Hangarior Phone Ave	11/14/2018	12/03/2018
16	SacCo-Child-OP-Power Ben	10/15/2018	01/09/2019
14	ACAC-OP-Franklin	10/03/2018	
13	SacCo-MHTC-Impt-Stockton	09/27/2018	
6	APCC-TWIC-14th Ave	06/29/2012	11/27/2013
4	SacCo_BPT_Crestwood-SHF-Reddick	02/10/2011	02/08/2011
2	ACAC-OP-Aramon	03/15/2010	06/30/2010

4. Highlight assessment and click “Delete”

The screenshot displays the SACPHTRAIN (LIVE) web application. At the top, there is a navigation bar with 'Home' and 'Entry T' links. Below this, a patient profile section shows 'TEST, ENTRY (758277000)' with details: 'M, 23, 05/11/96', 'Ht: 5' 10", Wt: 185 lbs, BMI: 26.5'. To the right, it lists 'Ep: -', 'Problem P: -', and 'DX P: -'. The main area is titled 'CSI Assessment' and contains a table with two columns: 'Date Off F, Contact To Req. Srv.' and 'Appointment First Offer Date'. The table has one row with the dates '07/11/2019' and '07/11/2019'. At the bottom of the table, there are four buttons: 'Add', 'Edit', 'Delete', and 'Cancel'. The 'Delete' button is circled in red, and a black arrow points to it. The bottom right corner of the interface shows 'SACPHTRAIN (LIVE)'.

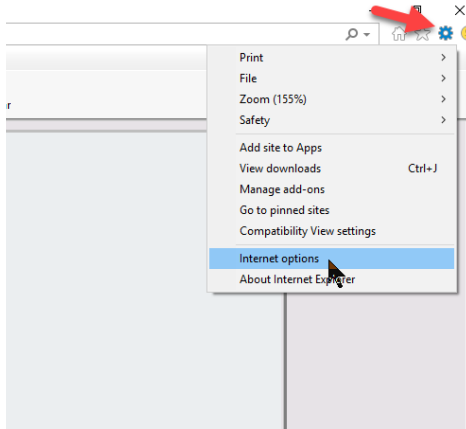
Date Off F, Contact To Req. Srv.	Appointment First Offer Date
07/11/2019	07/11/2019

OrderConnect-2 Factor Authentication Error Fix

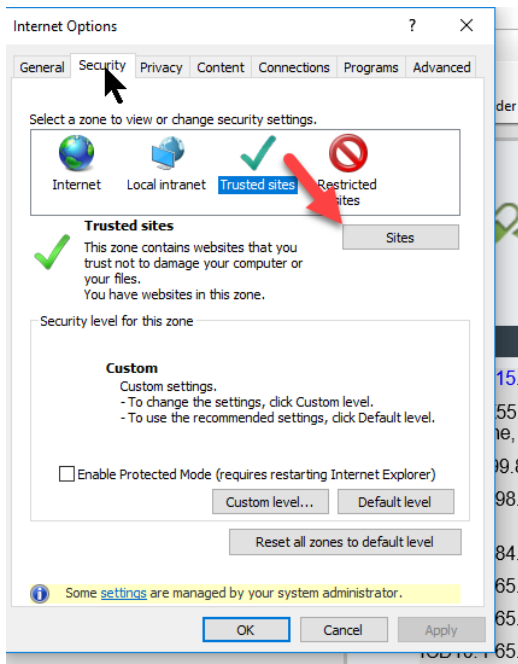
This is for those who prescribe medications

This may be caused by a change in the Verizon URL and the steps below should correct the issue.

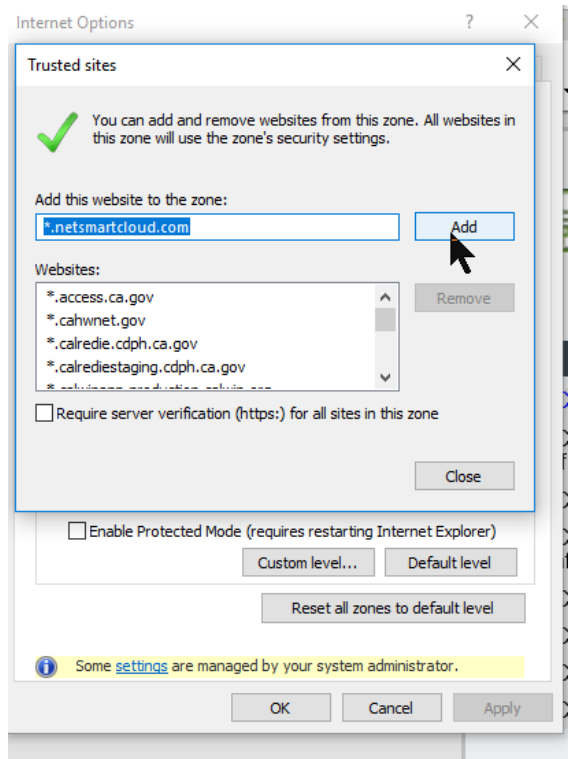
1. While in Order Connect on Internet Explorer, click on the **Gear** Icon in the upper right side
2. Click on **“Internet Options”**



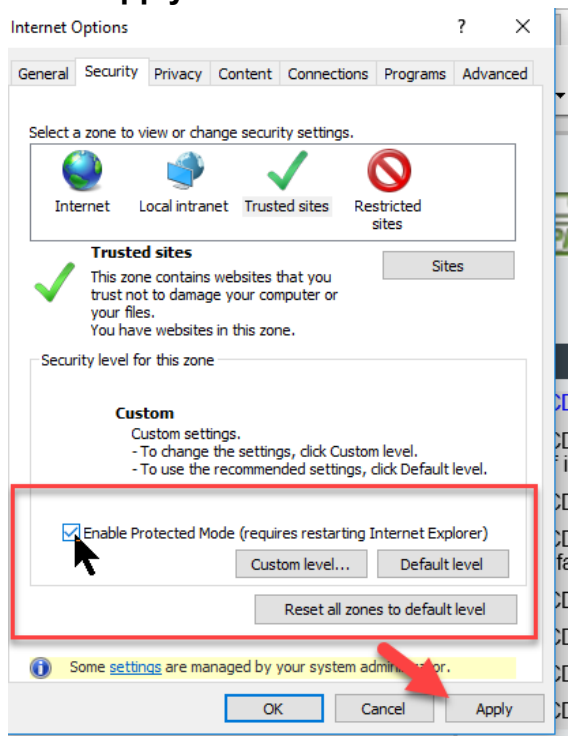
3. Click on the **“Security”** tab
4. Click on the **“Sites”** button



5. In the **“Add this website to the zone”** field type in **.netsmartcloud.com*
6. Click the **“Add”** button and then **“Close”**

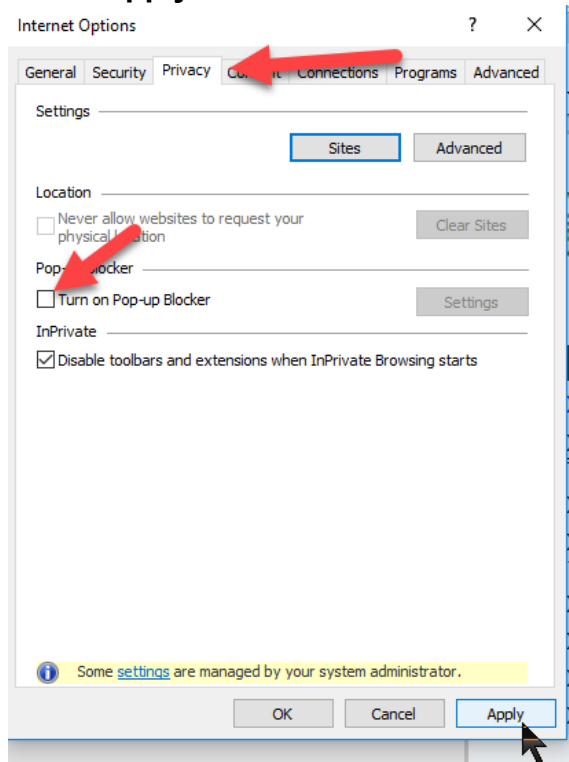


7. Click **“Enable Protected Mode”** checkbox
8. Click **“apply”**



9. Click on the **“Privacy”** tab
10. Uncheck the **“Turn on Pop-Up Blocker”** checkbox

11. Click “Apply”



12. Click on the “Content” tab

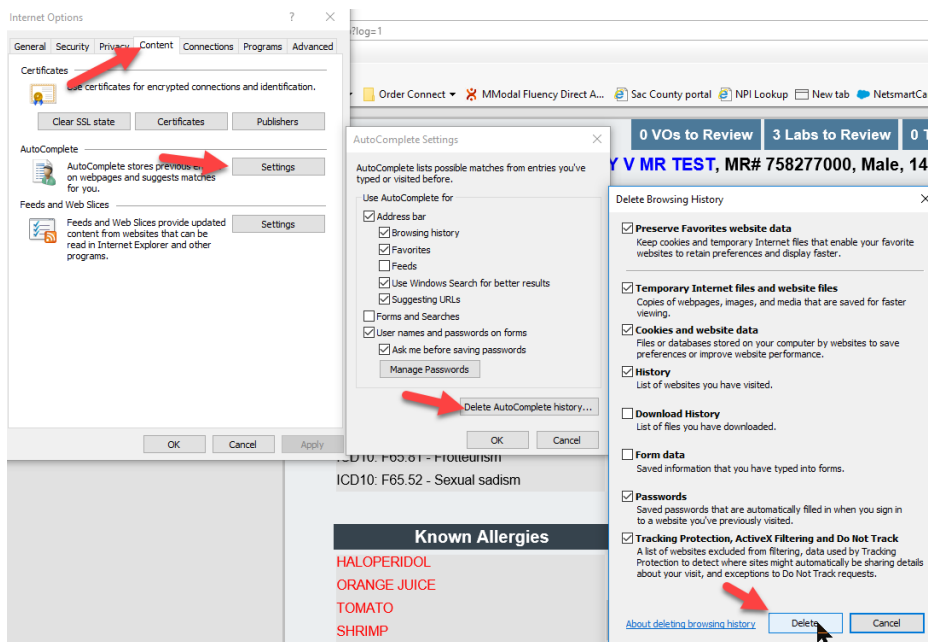
13. Click the “Settings” button

14. Click “Delete Autocomplete History” button

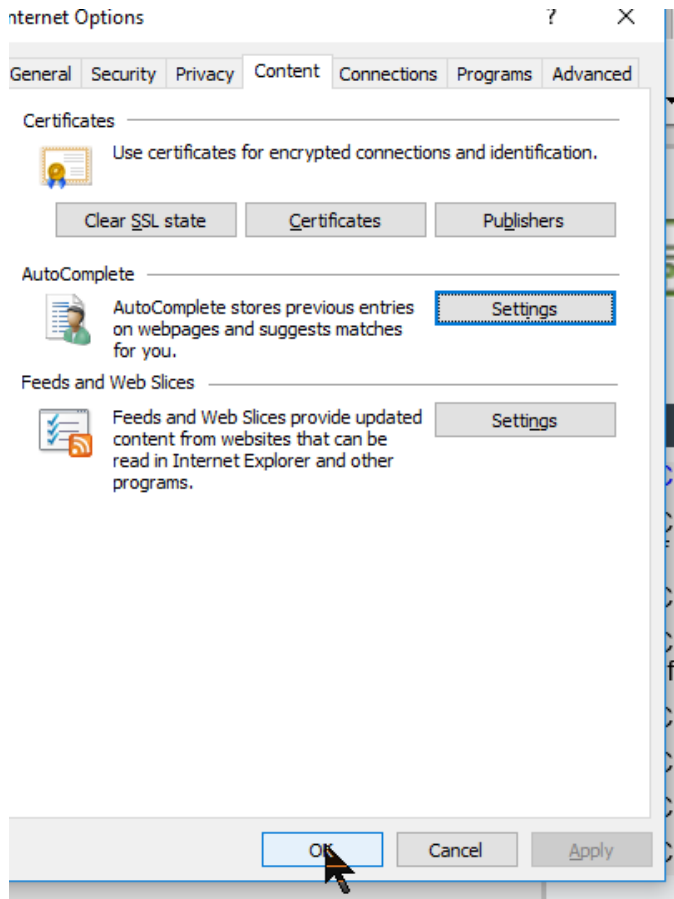
15. Click “Delete” button and wait a few seconds

16. Click “Ok” on the “AutoComplete Settings” screen

- a. You should check the same options on the “Delete Browsing history” window as you see below.



17. Click **“Ok”** the Internet options screen to close it

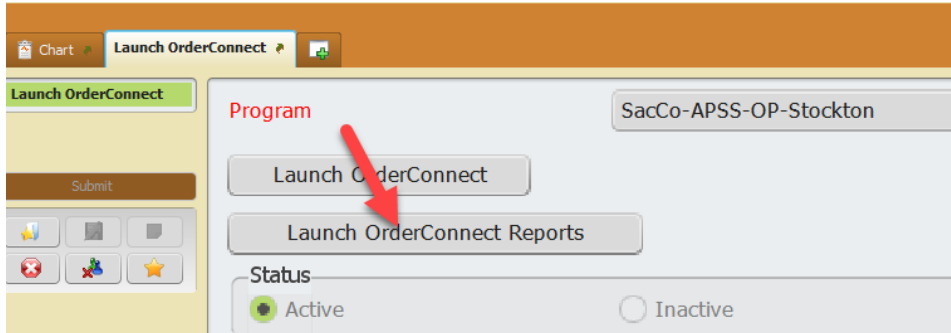


18. Close Internet Explorer and Re-launch Order Connect

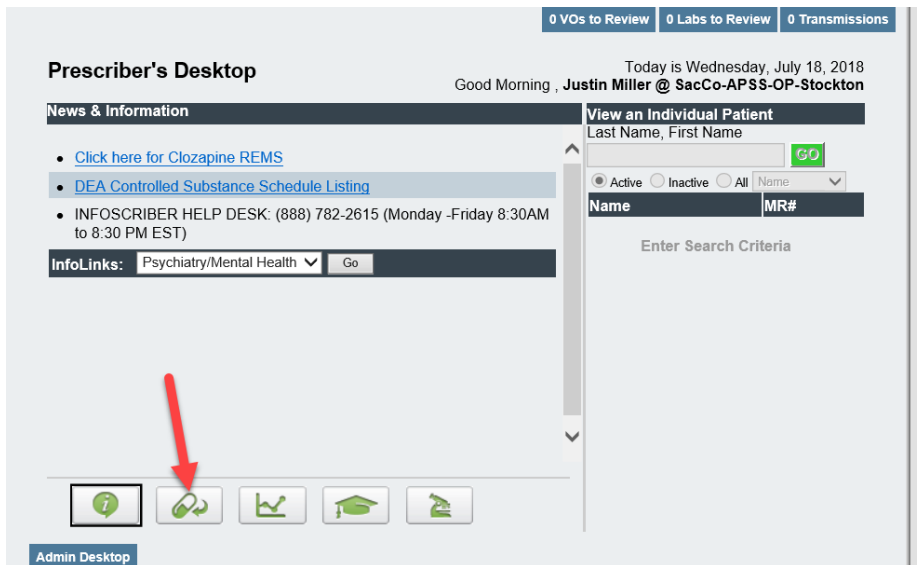
Transfer Pending Prescription

This is for those who prescribe medications

1. Open Launch Order Connect for any client (***you can transfer more than 1 prescription and can select prescriptions from different providers in this screen***)
2. Click on “Launch Order Connect Reports”



3. Click on the “Prescriber Queue” icon



4. Once in the Prescribers Queue click on the Provider dropdown and select who the original Prescription was sent to.
5. Find the Prescription and select “Transfer to Me” link and then follow the prompts.

Prescribers Queue

Provider: Rao, Swati

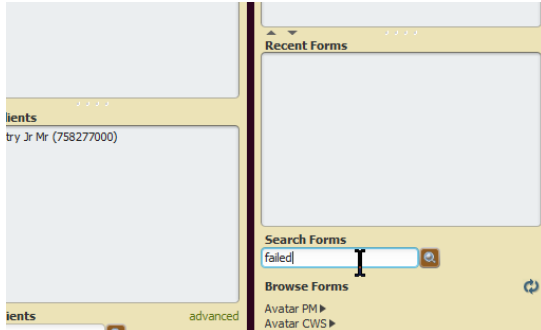
[Return](#)

Verbal Orders (0) Rx Change Requests (0) Refill Requests (33) Unmatched Refill Requests (107)

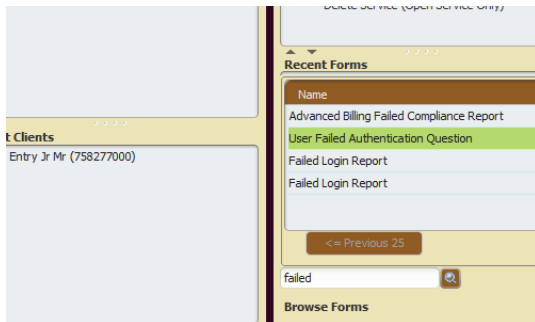
Received #	Patient Name	Prescriber	Prescription									
12/05/2016	JONES, BENJAMIN T	S. Rao	Transfer to me	Received	Agent	Order ID	Action	Prescription	Schedule	Diagnosis	Pharmacy	
								Change Order	clonazepam - 0.5 MG, TAB, PO Take one and one half (1.5) tablets by mouth every morning	4	Schizophrenia, undifferentiated	CVS 16106 IN TARGET
				12/05/2016	R. Fuller	13206834	Change Order	clonazepam - 1 MG, TAB, PO Take one (1) tablet by mouth at bedtime	4	Schizophrenia, undifferentiated	CVS 16106 IN TARGET	
							Change Order	Zolpidem - 10 MG, TAB, PO Take one (1) Tablet At Bedtime, As Necessary for sleep disturbance.	4	Schizophrenia Undifferentiated Type	CVS 16106 IN TARGET	
12/05/2016	CORONEL, RUTH M	S. Rao	Transfer to me	12/05/2016	N. Meinhardt	13216589	Discontinue	clonazepam - 0.5 MG, TAB, PO Take one half (1/2) Tablets Twice a Day, As Necessary	4	ANXIETY STATE NOS	RITE AID-6661 AUBURN BLVD	
12/05/2016	LIVINGSTON, RANDY	S. Rao	Transfer to me	Received	Agent	Order ID	Action	Prescription	Schedule	Diagnosis	Pharmacy	
				12/05/2016	N. Meinhardt	13216930	Change Order	Lunesta - 2 MG, TAB, PO Take one (1) tablet by mouth at bedtime	4	Transitory Illness	WALGREENS #06658	
12/12/2016	LASTRA, JOHNNY	S. Rao	Transfer to me	Received	Agent	Order ID	Action	Prescription	Schedule	Diagnosis	Pharmacy	
				12/12/2016	R. Fuller	13359548	Reorder	clonazepam - 0.5 MG, TAB, PO Take one (1) tablet by mouth twice a day, as needed	4	No Entry	Walmart Pharmacy 5192	
07/12/2018	ABDULLAH, SABAH	S. Rao	Transfer to me	Received	Agent	Order ID	Action	Prescription	Schedule	Diagnosis	Pharmacy	
				07/12/2018	H. Hogan	25293171	Change Order	Zolpidem - 5 MG, TAB, PO Take one (1) tablet by mouth at bedtime, as needed	4	Major depressive disorder, recurrent severe without psychotic features	Walmart Neighborhood Market 5982	

Failed Authentication question setup

1. Log into Avatar
2. Go to the Search forms Field
3. Type in the word “Failed”



4. Once the Results appear, double click on the “User Failed Authentication Question”



5. Left Side- Enter the information as if you are logging into Avatar
--(you may need to click in the field before you enter data)
 - a. Enter YOUR System Code
 - b. Enter YOUR Username
 - c. Enter your Password (press enter)
 - i. This will open all fields on form
 - d. Click on “Activate Question” “Yes”

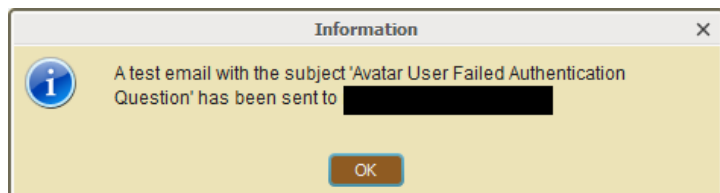
A screenshot of the 'User Failed Authentication Question' form. The form has a left sidebar with a 'Submit' button and 'Online Documentation' link. The main area contains several input fields: 'System Code' (with 'test' entered), 'Username' (with 'testert01' entered), 'Password' (with '*****' entered), and 'Activate Question' (with 'Yes' selected). To the right, there are fields for 'Failed Authentication Question', 'Failed Authentication Question Answer', and 'Email Address'. A 'Test Email' button is at the bottom right. Red arrows point to the 'System Code', 'Username', 'Password', and 'Activate Question' fields.

6. Right Side- Complete each field
 - a. Create a “Failed Authentication Question”

- b. Create an answer in the “Failed Authentication Question Answer” field
- c. Enter your email address in the “Email Address” field
- d. Click on the “Test Email” button

The screenshot shows a web form titled "User Failed Authentication Question". On the left, there is a sidebar with a "Submit" button and several icons. The main form area contains the following fields: "System Code" (text box with "test"), "Username" (text box with "testert01"), "Password" (text box with "*****"), "Activate Question" (radio buttons for "Yes" and "No", with "Yes" selected), "Failed Authentication Question" (text box with "What is your cats name?"), "Failed Authentication Question Answer" (text box with "Fluffy"), "Email Address" (text box with "test@test.com"), and a "Test Email" button. Red arrows point to the "Failed Authentication Question", "Failed Authentication Question Answer", and "Email Address" fields. A green arrow points to the "Test Email" button.

7. You should receive confirmation that the email has been sent

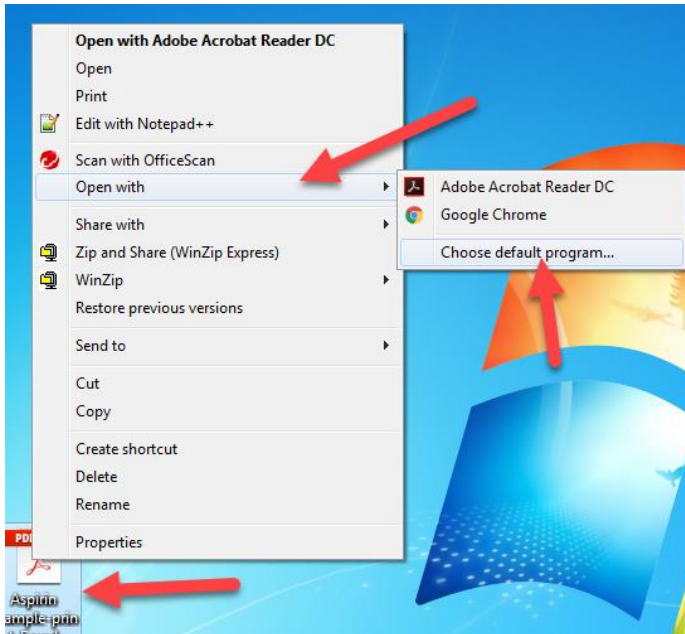


8. Click on “Submit” on the left to Save and Close

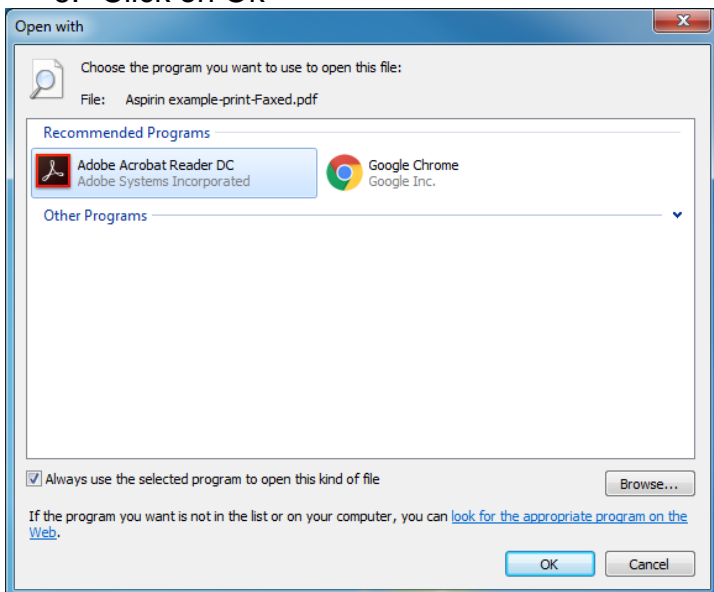
The screenshot shows the same "User Failed Authentication Question" form as before. A red arrow points to the "Submit" button in the left sidebar.

Fix instructions for PDF association

1. Find a PDF document.
 - a. Either on your desktop or in a folder
2. Right click (with the mouse) to open the menu
3. Click on "Open with"
4. Click on "Choose default program"



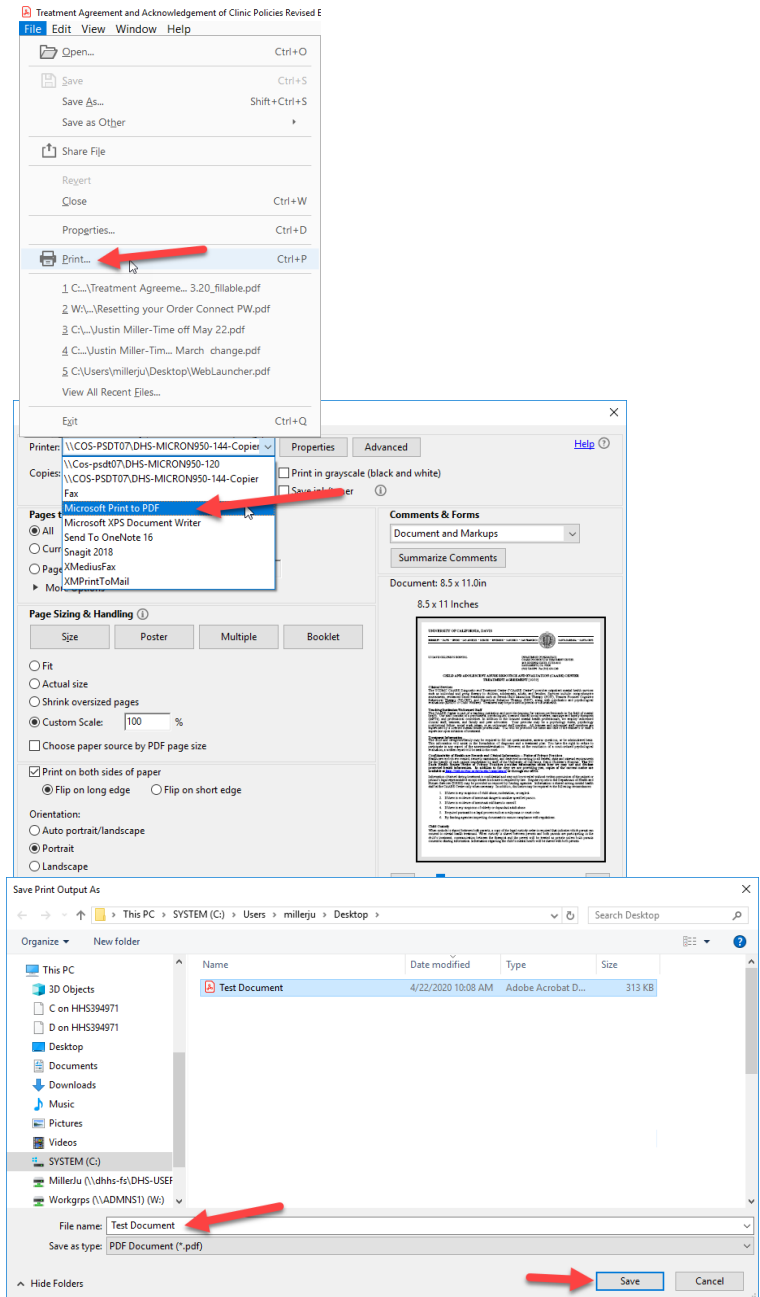
5. Choose your Adobe Reader program.
6. Click on Ok



7. Try to Open document in Avatar

Printing to PDF

1. Click on “File” on the top left
2. Select “Print”
3. Select “Microsoft Print to PDF”
4. Click on the “Print” button
5. Select the location of where you want to save the document
6. Create a File Name
7. Click on the **“Save”** button



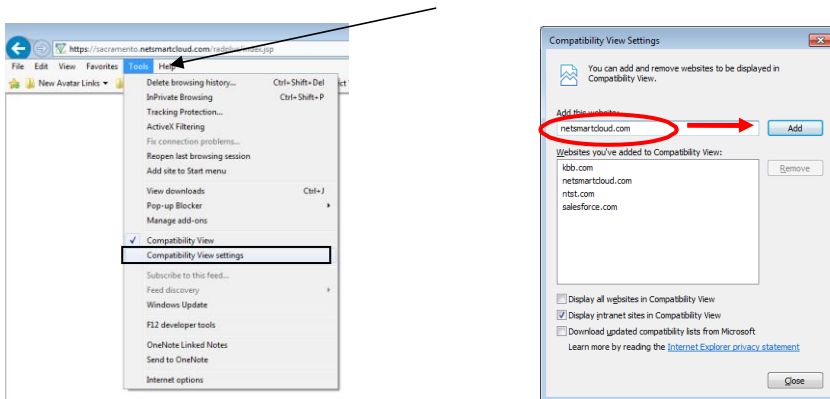
Internet Explorer and Java issues

Status 404 error

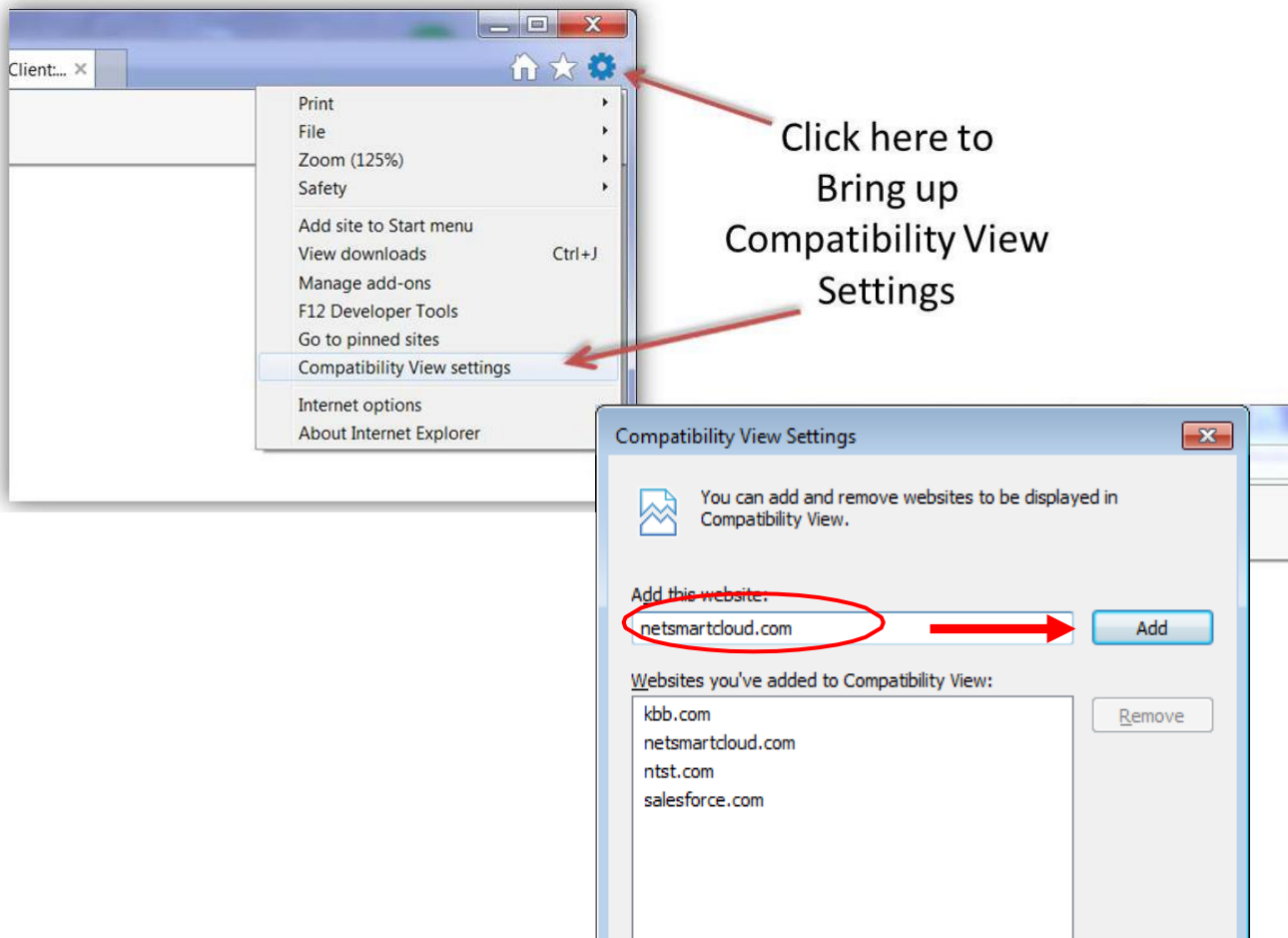
If someone calls in with a status 404 error it is usually because they are on a newer version of Internet Explorer either 10 or 11. There may need to be 2-3 changes made in order to make Avatar work.

Change Compatibility View Settings for Internet Explorer 10

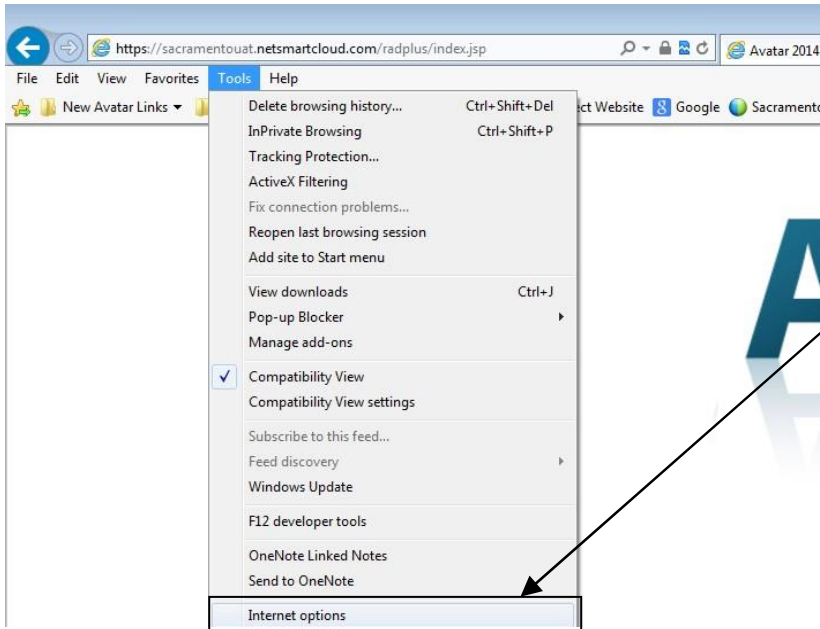
- Click on the Tools menu then choose Compatibility View Settings
- Click on “Add”
- Click on close
- If they cannot see the Tools menu, have the user click on the “Alt” key on the keyboard to show the menu.



Change Compatibility View Settings for Internet Explorer 11 For IE 11 use the path below



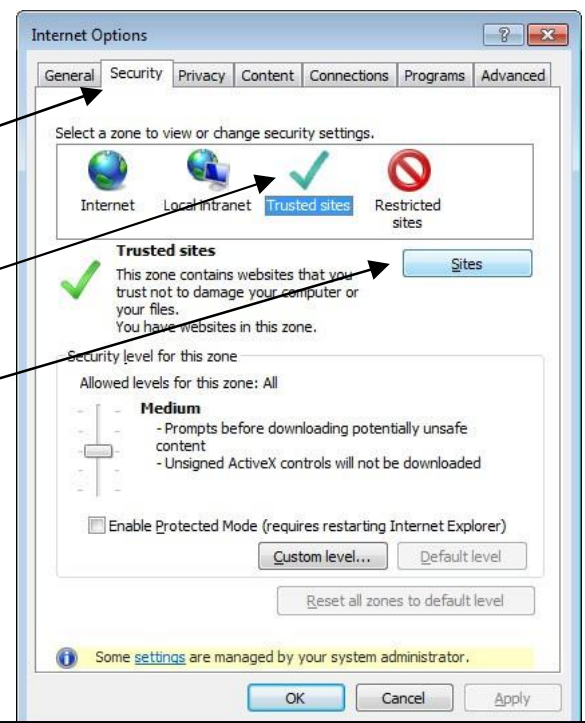
1. Add Netsmartcloud to trusted sites-



Select "Internet Options"

Click on the Security tab

Click the "Trusted Sites" icon Click on the Blue "Sites" button

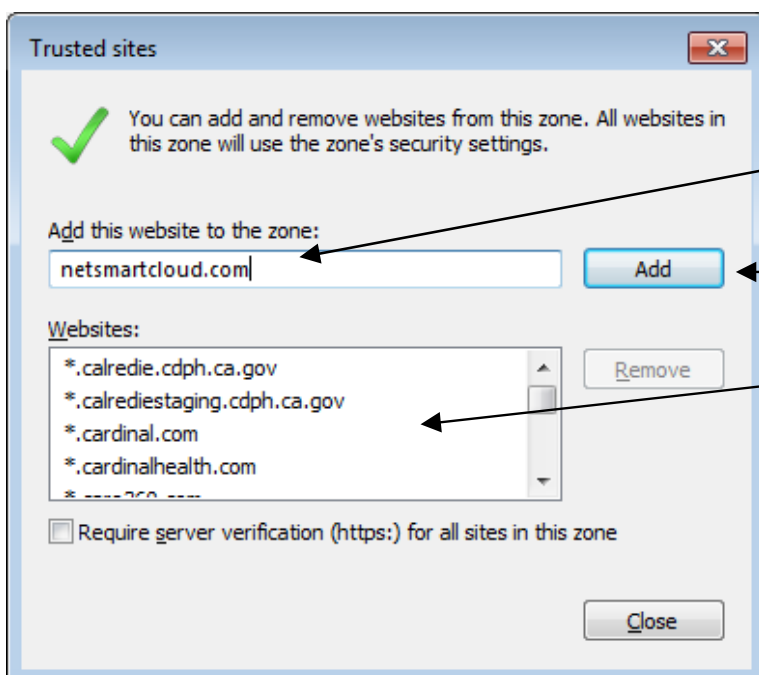


netmsartcloud.com should appear in the "Add this website to the zone" If it

does click the "Add" button

If not it may already be on the websites list.

****Make sure to have them Restart the computer after making these changes** Then have them Re-launch Avatar**

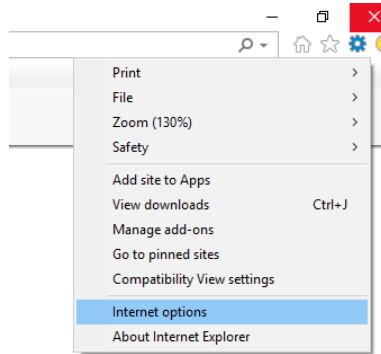


Temporary Fix instructions for Perceptive

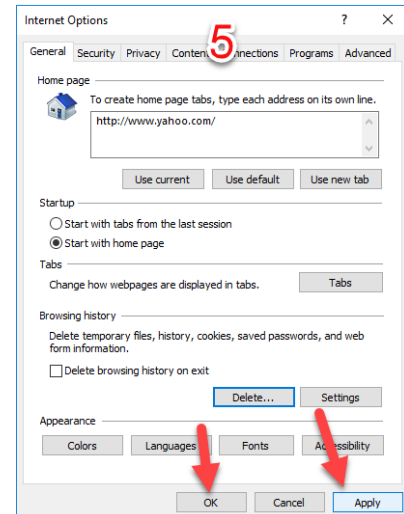
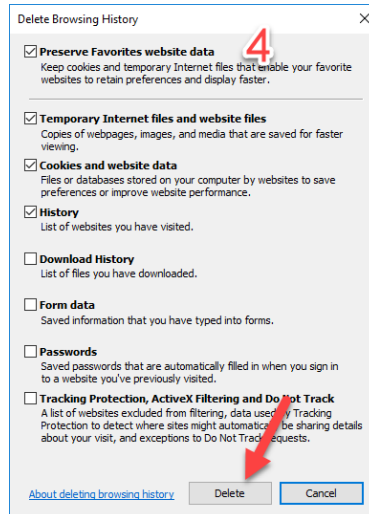
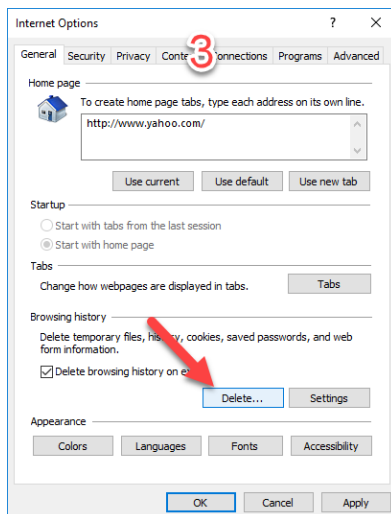
Clear Internet Explorer browser files and Java Files

How to clear Internet Explorer temporary files

1. Close out of Avatar completely
2. Go to any Internet Explorer browser. Click on the Setting icon and select “Internet Options”

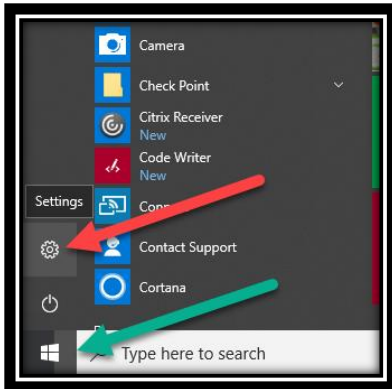


3. Click on the “Delete” button
4. Select what data you want to Delete.
5. Click Delete
6. Click “Apply” and “Ok”

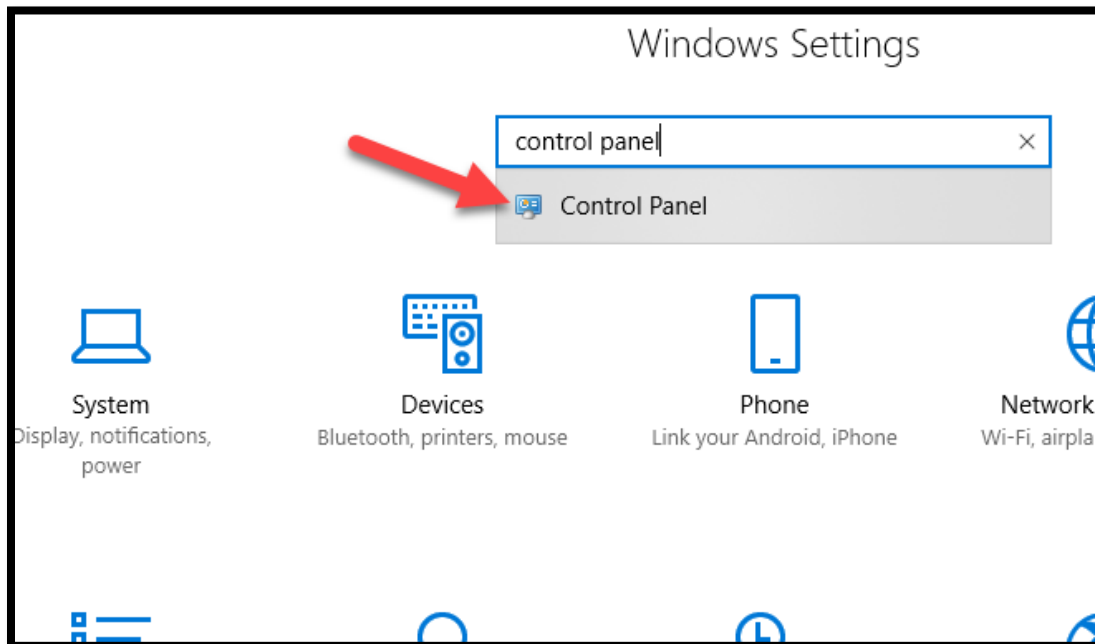


Java Temporary File deletions Windows 10

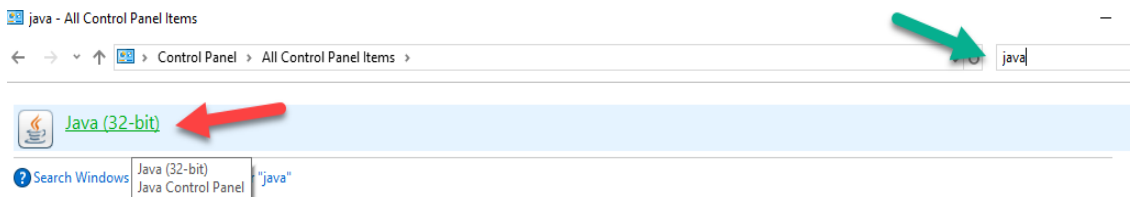
1. Click on the Start icon on the bottom left of computer screen
2. Select the “Settings” icon



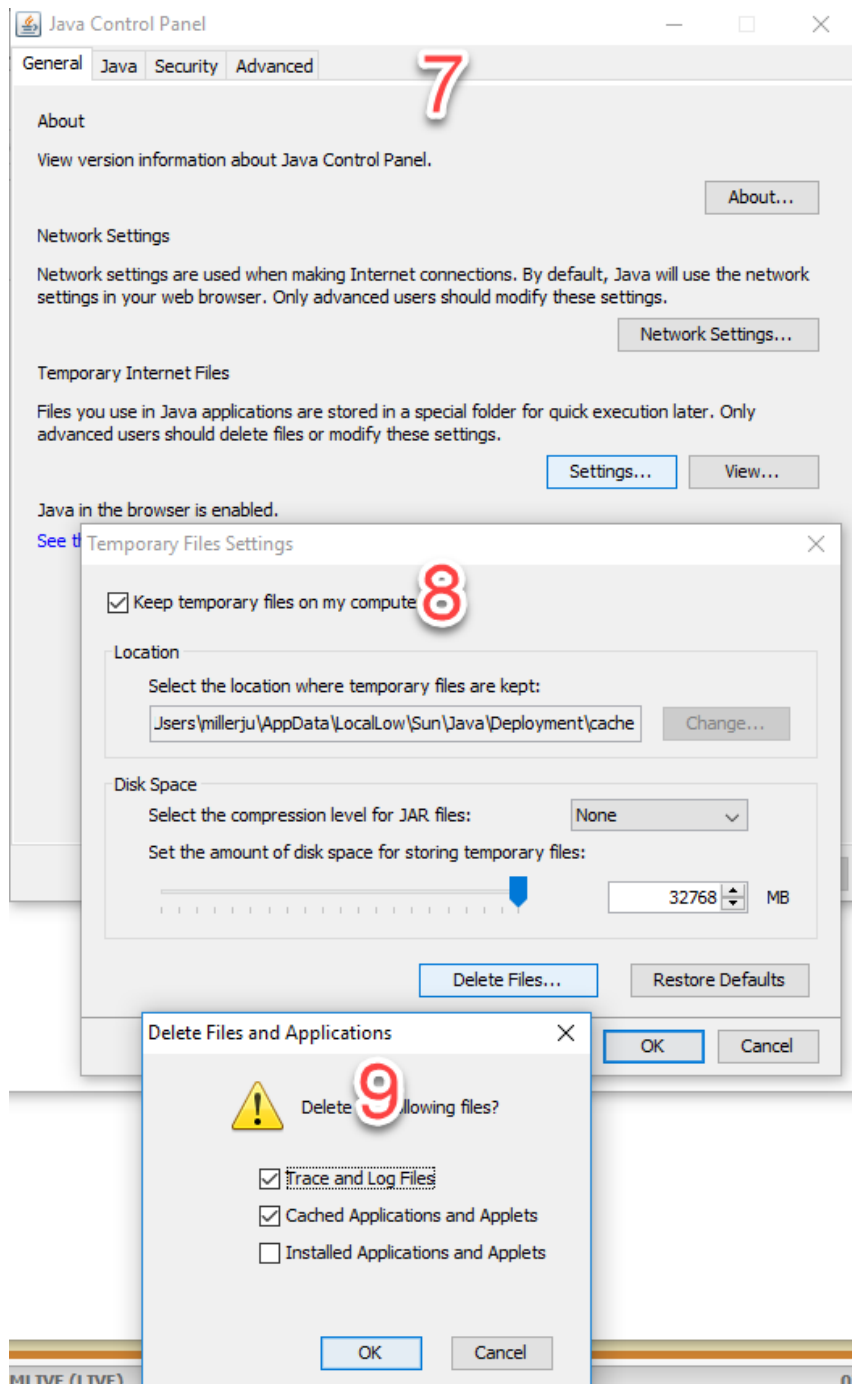
3. In the “Windows Settings” search for “Control Panel”
4. Select Control Panel by clicking on the search result



5. In the “Control Panel” windows search for “Java”
6. Click on the “Java (32bit)” to open the control panel



7. Click on the “Settings” button
8. Click on “Delete Files”
9. Select the selections you want and click “Ok”



10. Relaunch Avatar